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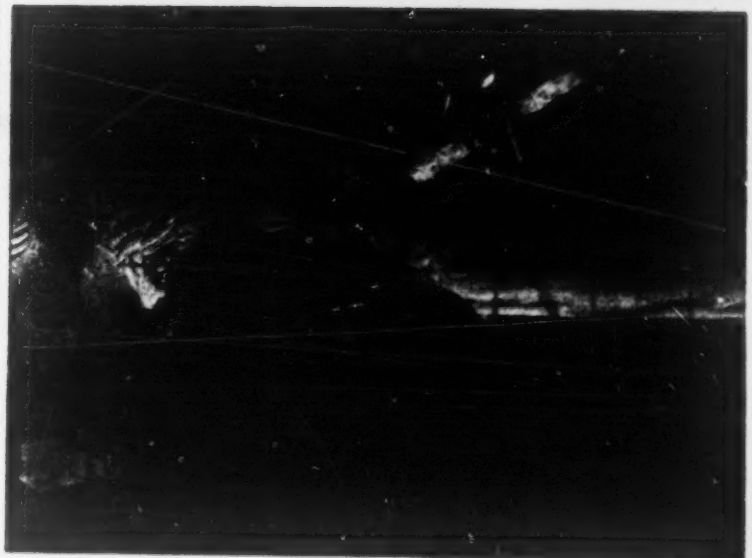
graphic arts monthly

THE MAGAZINE OF THE PRINTING INDUSTRY

FEATURES



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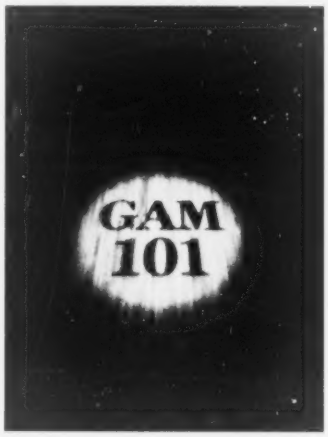
GAM 101
Official Industry Ranking Of The Top Printing Firms

This detachable double-gatefold form contains the 1989 official ranking of the 101 largest printing companies in North America, ranked by sales volume for their most recently completed fiscal year, along with salient information for each firm.

In addition, there are listings of the top greeting card manufacturers, financial printers, business forms printers, and color trade shops. These are maintained separately to avoid distortion of the main list, which concentrates on commercial printers and publication-type printers.



Data for virtually all the listings were obtained from the companies themselves. In a few cases, the sales figures had to be estimated, either because of accounting practices or because of the nondisclosure policies of certain privately-held companies.

A word of caution: Use of the data to make direct comparisons can be very misleading, even though every effort has been made to exclude nonprinting revenues from the totals. For example, commercial printers generally include billings for paper, while publication printers customarily do not. These qualifications notwithstanding, we believe the GAM 101 is the best available overview of the industry's leaders.

Additional copies of the 1989 GAM 101 are available for $5.00 each; send payment with order to Frank Pruzina, Reprint Services–Cahners Publishing Company, 1350 E. Touhy Ave., Des Plaines, IL 60018.

RANKING BY EMPLOYEE

1	R.R. Donnelley	24,000	36 Lehigh Press	1,000	70 Arandell-Schmidt	410
2	Deluxe Corp.	16,628	37 Stevens Graphics	1,000	71 A.D. Weiss	400
3	Lawson Mardon	7,800	38 American Signature	983	72 Henry Wurst	400
4	Dennison Mfg.	7,600	39 Monroe Printing	950	73 Noll	400
5	Arcata	7,200	40 American Bank Note	900	74 Petty Co.	400
6	World Color	6,700	41 Publisher's Printing	890	75 Riverside Press	390
7	Quebecor	6,000	42 Fleming Packaging	800	76 Danbury Printing	375
8	John H. Harland	5,600	43 Queens Group	800	77 Meehan-Tooker	375
9	Taylor Industries	5,000	44 Sheridan Press	725	78 Wisconsin Color Press	375
10	Sullivan Graphics	4,800	45 Combined Communications	672	79 Latham Process	372
11	Maxwell	4,600	46 Mack	665	80 Fort Dearborn Litho	350
12	Quad Graphics	3,880	47 Alden Press	650	81 Madison Graham	350
13	Continental Graphics Holdings	3,815	48 Alford Industries	650	82 AGI	340
14	Southam Printing	3,800	49 Hart Graphics	650	83 Avanti Press	340
15	Banta	3,700	50 Ivy Hill	650	84 Williamson	340
16	Jostens	3,500	51 Cairn Capital	635	85 L.P. Thebault	330
17	Treasure Chest	3,400	52 Waverly Press	632	86 American Printers	303
18	Brown	3,300	53 Webcrafters	620	87 John D. Lucas	301
19	Meredith Burda	3,200	54 Shea Communication	600	88 Vernon Company	300
20	Graphic Industries	2,978	55 K-P Companies	575	89 Sandy Alexander	283
21	Western Publishing	2,600	56 Danner Press Press of Ohio	570	90 Daniels	280
22	Trans-Continental	2,500	57 Keller Crescent	554	91 Northeastern Graphics	275
23	American Bank Stat.	2,350	58 U.S. Playing Card	550	92 Lasky Company	265
24	Ringier America	2,300	59 George Rice	523	93 Regensteiner	260
25	Cadmus	1,950	60 U.S. Banknote	520	94 Berlin Industries	250
26	Perry	1,700	61 Gulf Printing	512	95 Litho Prestige	250
27	Clarke Checks	1,547	62 Graftek Press	500	96 Retail Graphics Printing	250
28	Foote & Davies	1,475	63 Spencer Press	500	97 Century Graphics	238
29	Engraph	1,425	64 Empery Corp.	487	98 Editors Press	235
30	Courier	1,400	65 Standard Publishing	448	99 Printco	235
31	Taylor Publishing	1,300	66 Moebius	450	100 E & D Web	175
32	Valassis	1,300	67 Universal Printing	450	101 Pacific Lithograph	170
33	Bertelsmann	1,211	68 Anderson Lithograph	430		
34	Judd's	1,200	69 Continental Web	420		
35	Shorewood Packaging	1,050				

BUSINESS FORMS PRINTERS

Rank, Name (Parent), Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 **Moore Corporation**[1], Toronto, Ontario	$2,500,000	+ 9	26,000	M.K. Goodrich
2 **Standard Register**[1], Dayton, OH	675,000	+ 12	6,355	J.K. Darragh
3 **Uarco (Settsu Corporation)**, Barrington, IL	524,000	0	4,500	H.L. Koelling
4 **American Business Products**[1], Atlanta, GA	358,242	+ 10	4,000	T. Carmody
5 **Reynolds & Reynolds**[1], Dayton, OH	352,102	+ 6	2,794	R.C. Nevin
6 **Duplex Products**[1], Sycamore, IL	298,489	+ 7	2,736	C.L. Peterson
7 **New England Business Service**[1], Groton, MA	217,487	+ 15	2,013	R.H. Rhoads
8 **SCM Allied Paper Inc.**, Dayton, OH	147,000	+ 5	750	W.H. Ames
9 **Ennis**[1], Ennis, TX	128,170	+ 9	1,500	K.A. McCrady
10 **R.L. Crain**[1], Ottawa, Ontario	101,876**	+ 5	1,040	J.F. Frank
11 **Office Electronics**, Itasca, IL	87,100	+ 22	480	R.A. Houston
12 **Shade Computer Forms**, Green Bay, WI	78,000	+ 4	285	J.L. Kemerling
13 **Jordan Graphics**[1] **(Ruddick Corp.)**, Charlotte, NC	51,450	+ 6	390	J.L. Chanon

EXPLANATION OF ABBREVIATIONS

COM Commercial Printing
PUB Publications
BK Books
CAT Catalogs
SPC Specialty
INS Inserts

FOOTNOTES

[1] Publicly held
[2] Letterpress
[3] Flexo
[4] Screen press
[5] Diecutting
[6] Gold leaf press
[7] Sheetfed intaglio
[8] Forms press
[9] Coaster press
[10] Cameron belt press
[11] Coater
[12] Specialty press
* Information not available
** Estimated

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
1 **R.R. Donnelley & Sons**[1], Chicago, IL	$2,878,432	$2,482,865	+ 16	24,000	$119,930	31	*	COM	J.R. Walter	125
2 **Deluxe Corporation**[1], St. Paul	1,200,000	948,000	+ 27	16,628	72,170	60	*	SPC	H.V. Haverty	74
3 **Lawson Mardon**[1], Mississauga, Ont.	928,378**	865,008	+ 7	7,800	119,020	57	*	COM,SPC	L.G. Tapp	107
4 **Maxwell Communication**, St. Paul, MN	730,000	550,000	+ 33	4,600	158,700	15	6,162,344,2	COM,PUB	R. Smith	3
5 **Dennison Mfg. Co.**[1], Framingham, MA	721,776	708,001	+ 2	7,600	94,971	9	6,0,25,2,52	COM	N.S. Gifford	145
6 **World Color Press**, Effingham, IL	670,000**	655,000	+ 2	6,700	100,000	7	0,543,100,12,4	PUB	J.A. Dawson	86
7 **Quebecor Printing**[1], Montreal, Quebec	627,000**	N.A.	N.A.	6,000	104,500	46	*	COM,PUB	J. Neveu	1
8 **Sullivan Graphics, Inc.**, Nashville, TN	575,000	N.A.	N.A.	4,800	119,790	25	*	COM,BK,SPC	J.T. Sullivan	1
9 **Treasure Chest Advertising**, Mundelein, IL	540,000	470,000	+ 15	3,400	158,820	15	*	INS	S.G. Scheller	22
10 **Banta Corporation**[1], Menasha, WI	526,000	302,000	+ 74	3,700	142,160	11	*	COM,BK,PUB	C.W. Aurand Jr.	87
11 **Arcata Graphics Company**, Kingsport, TN	516,000	500,000	+ 3	7,200	71,670	9	*	COM,BK,PUB	R.L. Swam	84
12 **Western Publishing**[1], Racine, WI	470,000	385,000	+ 22	2,600	180,770	3	45,31,0,10	BK,SPC	R.A. Bernstein	82
13 **Southam Printing**, Toronto, ON	455,346**	443,000	+ 3	3,800	119,830	18	*	COM	M.A. Quinn	108
14 **Meredith Burda**, Des Moines, IA	453,000	434,000	+ 4	3,200	141,560	7	0,50,164	COM	W. Voss	20
15 **Valassis Inserts (Consolidated Press U.S.)**, Livonia, MI	400,000	400,000	0	1,300	307,690	3	0,57	INS	D.A. Brandon	20
16 **Brown Printing (Gruner + Jahr)**, Waseca, MN	365,000	348,000	+ 5	3,300	110,610	6	0,241,30	PUB,CAT,INS	J.K. Rifenbergh	41
17 **Taylor Industries**, North Mankato, MN	360,000**	N.A.	N.A.	5,000	72,000	30	*	COM	G. Taylor	14
18 **Quad Graphics**, Pewaukee, WI	350,000	415,000	- 16	3,880	90,206	4	0,140,20	PUB,INS,COM	H.V. Quadracci	18
19 **John H. Harland Company**[1], Atlanta, GA	333,300	318,100	+ 5	5,600	59,520	42	155,48,0,175	SPC	J.W. Robinson	66
20 **Trans-Continental Printing**[1] **(Groupe Transcontinental)**, Saint-Laurent, Quebec	292,600	229,900	+ 27	2,500	117,040	12	*	INS	C. Gentile	13
21 **Continental Graphics Holdings**, Los Angeles, CA	291,567	261,068	+ 12	3,815	76,430	9	128,37,0,5,2	COM,BK,SPC	C.F. Bourland	1
22 **Graphic Industries**[1], Atlanta, GA	270,212	223,489	+ 21	2,978	90,740	40	326,96,0,32	COM	M.C. Pope III	19
23 **Ringier America**, Itasca, IL	237,707	218,737	- 9	2,300	103,350	4	16,35,136,25	PUB	E.C. Nytko	4
24 **Foote & Davies**, Atlanta, GA	196,900	185,000	+ 6	1,475	133,490	2	4,121,0	COM,PUB	A.A. Herring	102
25 **Perry Printing (Journal Communications)**, Waterloo, WI	161,800	147,400	+ 10	1,700	95,180	6	6,23,4	COM	R.L. Perry	58
26 **Cadmus Communications**[1], Richmond, VA	160,000	152,100	+ 5	1,950	82,050	16	109,46,0,5	COM,PUB	W. Stettinius	5
27 **Lehigh Press**, Pennsauken, NJ	153,600	139,160	+ 10	1,000	153,600	6	38,67,0,3	COM	J.D. DePaul	65
28 **Alden Press Inc.**, Elk Grove Village, IL	152,000	138,000	+ 10	650	233,850	1	0,70,0	COM	J. Spier	43
29 **Engraph**[1], Atlanta, GA	150,600	122,800	+ 23	1,425	105,680	8	*	SPC	L. Benatar	56
30 **Stevens Graphics (Bell South)**, Atlanta, GA	150,000	139,000	+ 8	1,000	150,000	5	*	SPC	H.M. Inman	92
31 **Jostens**[1], Minneapolis, MN	150,000	125,000	+ 20	3,500	42,860	5	50,0,0	BK	H.W. Lurton	52
32 **American Bank Stationery**, Baltimore, MD	148,621	142,876	+ 4	2,350	63,240	30	*	SPC	E.R. Heiser	62
33 **Shorewood Packaging**[1], Farmingdale, NY	127,136	98,973	+ 28	1,050	121,080	6	*	SPC	P.B. Shore	23
34 **American Signature Graphics (ASG Acquisition Corp.)**, Memphis, TN	121,785	109,996	+ 11	983	123,890	3	23,73,0	PUB	T.A. Tevis	2
35 **Shea Communication**, Louisville, KY	120,000	100,000	+ 20	600	200,000	3	0,40,39	COM,PUB,CAT,INS	M. Shea	1
36 **Keller Crescent**, Evansville, IN	110,254	114,526	- 4	554	199,010	1	*	COM	T.M. Smythe	104
37 **Meehan-Tooker**, East Rutherford, NJ	110,000	75,000	+ 47	375	293,333	3	35,47,0	COM	M.D. Voss	42
38 **Clarke Checks (M.B. America)**, San Antonio, TX	109,570	107,532	+ 2	1,547	70,830	30	*	SPC	J.E. Colin	115
39 **Judd's, Incorporated**, Washington, DC	108,000	93,000	+ 16	1,200	90,000	3	6,74,0	PUB	T.A. Manning	121
40 **Queens Group**, Long Island City, NY	102,000	81,465	+ 25	800	127,500	4	*	SPC	E. Kaltman	58
41 **Fleming Packaging**, Peoria, IL	97,590	87,000	+ 12	800	121,990	6	66,13,9,13,34	SPC	T.J. Fleming	55
42 **George Rice & Sons**, Los Angeles, CA	96,483	86,419	+ 12	523	184,480	2	30,24,0	COM	E. Grossberg	110
43 **Bertelsmann Printing & Mfg. Corp.**, Berryville, VA	95,000	77,000	+ 23	1,211	78,450	5	54,32,0,12	BK	R. Hampp	3
44 **Anderson Lithograph**, Los Angeles, CA	90,000	68,000	+ 32	430	209,300	1	30,24,0	COM	G.T. Parana	35
45 **Alford Industries (Kane Industries)**, Ridgefield Park, NJ	87,200	79,700	+ 9	650	134,150	*	*	SPC	R.P. Kane	27
46 **Taylor Publishing (Insilco)**, Dallas, TX	86,850	82,600	+ 5	1,300	66,810	4	57,0,0,3	BK	F.P. Perliski	50
47 **Courier Corporation**[1], Lowell, MA	81,769	81,517	0	1,400	58,410	5	14,24,0	BK	J.F. Conway Jr.	165
48 **American Bank Note**[1] **(International Banknote)**, New York, NY	81,050	63,664	+ 27	900	90,056	3	*	SPC	E.H. Weitzen	194
49 **Cairn Capital Inc.**, Don Mills, Ont.	78,000**	69,500	+ 12	635	122,830	7	*	COM	D.M. Alloway	44
50 **Arandell-Schmidt**, Menomonee Falls, WI	77,800	70,685	+ 10	410	189,760	1	0,24,0	COM	F.E. Treis	67

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
51 Moebius Printing, Milwaukee, WI	$75,500	$58,000	+ 30	450	$167,780	1	15,31,0	COM	M. McDonough	78
52 Gulf Printing (Southwestern Bell), Houston, TX	75,000	51,590	+ 46	512	146,480	4	28,42,0,3	COM	R.D. Cashman	73
53 Ivy Hill (Warner Communications), New York, NY	71,000	60,000	+ 18	650	109,230	3	99,0,0	SPC	E. Kern	75
54 Empery Corporation, Paoli, PA	70,600	61,000	+ 16	487	144,970	7	*	SPC	A.J. Clegg	10
55 Monroe Printing, East Stroudsburg, PA	70,500	69,000	+ 2	950	74,210	4	62,53,0	PUB	R.D. Hughes	19
56 Petty Co., Inc., Effingham, IL	68,000	55,000	+ 24	400	170,000	2	1,62,0	COM	G.A. Whaling	11
57 United States Playing Card Company[1] (The Jesup Group), Cincinnati, OH	68,000	52,000	+ 30	550	123,636	1	2,2,0,4	SPC	R.C. Rule	157
58 Continental Web, Itasca, IL	65,000	60,000	+ 8	420	154,760	1	0,44,0	COM	K.W. Field	16
59 Danner Press/The Press of Ohio, Canton, OH	63,300	52,400	+ 21	570	111,050	2	11,41,0	SPC	D.H. Bracken	40
60 Webcrafters, Madison, WI	62,000	54,000	+ 15	620	100,000	2	3,54,0,2	BK	J.J. Frautschi	99
61 Publisher's Printing, Shepheardsville, KY	62,000	51,000	+ 22	890	69,660	1	12,55,0	PUB	F.E. Simon	123
62 United States Banknote, New York, NY	60,000	58,000	+ 3	520	115,380	3	45,24,0,10,7	SPC	M. Weissman	119
63 Retail Graphics Printing (RGP Corp.), Dallas, TX	60,000	50,000	+ 20	250	240,000	2	0,15,0	INS	J.G. Brown L.A. Thompson	6
64 Hart Graphics, Austin, TX	60,000**	58,725	+ 2	650	92,310	3	18,27,0,4,18	COM	W.L. Hart	15
65 Berlin Industries (Smith Investment), Addison, IL	58,000	43,500	+ 33	250	232,000	1	0,26,0	COM	F.E. Schmitt	53
66 Mack Printing, Easton, PA	57,216	60,892	− 6	665	86,040	1	13,29,0	PUB	P.F. Mack	87
67 Vernon Company, Newton, IA	57,000	51,000	+ 12	300	190,000	3	7,0,0,5	SPC	W.F. Vernon	87
68 Combined Communications, Lisle, IL	55,586	50,135	+ 11	672	82,720	2	*	PUB	R. Sanderson	43
69 K/P Companies, Berkeley, CA	55,000	43,000	+ 28	575	95,652	15	*	COM	J.W. Knapp	23
70 L.P. Thebault, Parsippany, NJ	54,000**	47,000	+ 15	330	163,640	1	30,12,0	COM	J.B. Thebault	35
71 Lasky Company, Millburn, NJ	53,000	52,000	+ 2	265	200,000	1	24,23,0	COM	R.H. Barnhard	72
72 Spencer Press, Wells, ME	53,000	47,500	+ 12	500	106,000	1	0,26,0	COM	J.E. Spenlinhauer III	49
73 Madison/Graham Colorgraphics, Los Angeles, CA	52,000	50,000	− 4	350	148,570	2	*	COM	C.N. Madison	36
74 Danbury Printing & Litho, Danbury, CT	48,200	46,100	+ 5	375	128,530	1	17,36,0	COM	M. Previdi	43
75 Henry Wurst Inc., North Kansas City, MO	47,000	42,000	+ 12	400	117,500	2	0,7,0	COM	J.C. Wurst	52
76 Fort Dearborn Lithographic, Chicago, IL	47,000	40,000	+ 18	350	134,290	3	46,0,0	SPC	T. Adler	65
77 The Sheridan Press, Hanover, PA	45,700	15,600	+ 293	725	63,030	2	16,0,0	BK	R.C. Sheridan	74
78 Waverly Press[1] (Waverly, Inc.), Baltimore, MD	45,315	44,328	+ 2	632	71,701	2	32,12,0	PUB	W.M. Passano Jr.	99
79 Noll Printing (Our Sunday Visitor), Huntington, IN	45,137	42,473	+ 6	400	112,840	1	0,39,0	COM	D.E. Scheiber	11
80 Century Graphics, Metairie, LA	44,217	44,053	0	238	185,790	2	0,24,0	INS	C.J. Eberts	27
81 Printco, Greenville, MI	43,500	35,866	+ 21	235	185,110	2	0,44,0	INS	J.A. Pentecost	21
82 Sandy Alexander[1] (Mickelberry Corp.), Clifton, NJ	42,856	42,778	0	283	151,430	1	21,16,0	COM	F. Stillo	25
83 Avanti Press, Miami, FL	42,500	33,500	+ 27	340	125,000	1	0,18,0	COM,CAT	J.R. Arriola	24
84 Universal Printing, St. Louis, MO	42,000	43,600	− 4	450	93,330	2	47,28,0	COM	R.A. Ebel	50
85 The Riverside Press, Dallas, TX	40,800	32,000	+ 28	390	104,620	4	38,6,0	COM,SPC	R. Lane	99
86 Graftek Press[1] (Devon Group), Woodstock, IL	40,060	34,707	+ 15	500	80,120	3	7,59,0	PUB	S.B. Pearlman	22
87 Williamson, Dallas, TX	40,000	40,000	0	340	176,647	1	35,22,0	COM	J.B. Williamson	105
88 Regensteiner Printing, West Chicago, IL	40,000	40,000	0	260	153,850	1	0,34,0	COM,PUB	D.E. Halliday	82
89 Wisconsin Color Press (MidContinent Printing), Milwaukee, WI	39,000	40,000	− 2	375	104,000	1	0,32,0	PUB	F. Cappetta	142
90 Standard Publishing[1] (Standex), Cincinnati, OH	37,789	36,272	+ 4	448	84,919	1	8,12,0	COM	F.D. Mosher	123
91 Daniels Printing, Everett, MA	37,133	36,600	+ 1	280	132,620	1	38,4,0,5	COM,SPC	L.S. Daniels	109
92 A.D. Weiss Litho[1] (Eagle Picher), Hollywood, FL	36,000	32,000	+ 13	400	90,000	1	0,88,0	PUB,INS,CAT	M.H. Streibig	41
93 Latham Process Corp.[1], New York, NY	36,000**	34,644	+ 4	372	96,770	2	12,32,0	COM	R. Gombach	49
94 Northeastern Graphics, North Haven, CT	35,000	20,000	+ 75	275	127,273	1	17,43,0	COM,INS	S. Bortner	1
95 Pacific Lithograph, San Francisco, CA	35,000	32,000	+ 9	170	205,880	1	9,2,0	COM	E.J. Flynn II	42
96 AGI Incorporated, Melrose Park, IL	33,000	33,000	0	340	97,060	1	*	COM,SPC	R. Block	21
97 Editors Press (Kiplinger), Hyattsville, MD	33,000	31,000	+ 6	235	140,430	1	4,25,0	PUB	K. King	37
98 Litho Prestige[1] (Unimedia), Drummondville, Quebec	32,600	46,991	− 31	250	130,400	1	0,21,0	PUB	E. Ferrat	36
99 American Printers & Lithographers, Chicago, IL	32,500	36,400	− 11	303	107,260	1	62,0,0,6	COM,SPC	R.B. Lifton L. Jaffee	78
100 John D. Lucas Printing, Baltimore, MD	32,100	35,095	− 9	301	106,640	1	25,22,0	COM	M.A. Krieger III	159
101 E & D Web, Cicero, IL	32,000	30,000	+ 7	175	182,860	1	0,24,0	COM,PUB	B. Love	95

GREETING CARD PRINTERS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 Hallmark Cards, Kansas City, MO	$2,300,000**	+ 15	20,000	I.O. Hockaday
2 American Greetings[1], Cleveland, OH	1,275,359	+ 6	20,500	M. Weiss
3 Gibson Greetings, Cincinnati, OH	404,000	+ 12	5,500	B. Sottile

FINANCIAL PRINTERS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 Bowne & Co.[1], New York, NY	$187,826	− 14	1,700	R.H. Koontz
2 Chas. P. Young, New York, NY	90,000	− 10	560	J. Swain
3 Sorg[1], New York, NY	80,000	+ 7	450	G.B. Sorg

COLOR TRADE SHOPS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Equipment: Scanners	Equipment: Color Pagination Systems	CEO
1 Applied Graphics Technologies, New York, NY	$100,000**	+ 10	19	18	S. Server P. Faucetta
2 Techtron Imaging Network, Chicago, IL	92,000	+ 11	22	30	J.J. Collins
3 Parkway USA (Parkway PLC, London), New York, NY	75,000**	0	6**	4	P. Ross
4 Jannock Imaging, Toronto, Ontario	74,050**	+ 30	6	10	W.H. Batten
5 American Color, Phoenix, AZ	55,000	+ 12	25	8	D. Brazell
6 Schawk, Des Plaines, IL	55,000	+ 15	17	11	C.W. Schawk
7 Enteron Group, Chicago, IL	40,000	+ 14	6	2	J.J. Reilly
8 Black Dot Graphics, Crystal Lake, IL	28,500	+ 16	6	6	E.T. Connor
9 Lincoln Graphics, Inc., Cherry Hill, NJ	19,125	+ 17	5	2	R.C. Drum
10 Kwik International, New York, NY	18,900	+ 10	2	2	R.J. Sirota
11 Phototype Color Graphics, Pennsauken, NJ	18,100	+ 38	3	3	J. Rubin
12 Magna Graphics, Inc., Lexington, KY	17,600	+ 19	3	1	K. Engle
13 Herzig Somerville, Toronto, Ontario	16,978**	+ 8	5	7	E. Herzig
14 Blanks Engraving, Dallas, TX	16,750	+ 10	5	3	L. Blanks
15 Rex Three, Miami, FL	16,000	+ 3	5	3	S.H. Miller
16 NEC Inc., Nashville, TN	14,700	+ 15	4	4	R.W. Luckett
17 Spectrum Companies, Minneapolis, MN	14,500	+ 12	6	4	M. Murray
18 Wilson Engraving, Dallas, TX	14,500	+ 7	4	6	E.L. Green Sr.
19 Kreber Graphics, Columbus, OH	12,100	+ 9	5	5	F. Kreber

[Editor's Note: Ongoing company consolidations, the merging of international operations, and the changing nature of the graphic arts prepress business make it impossible to compile comparative information for this listing. In several cases, the revenues shown are for more than color separation services and may include typesetting, color retouching, custom photo processing, and electronic prepress services.]

THE GAM 101

Profiling The Top 25

Supplementing this issue's GAM 101 ranking of the largest printing companies in North America—a ranking based on annual sales revenues as reported—are these profiles of the top 25 firms and chief executive officers. Coverage here was compiled from information supplied by the firms and from other sources.

The largest printing company in North America, one of the largest firms in the world specializing in the graphic arts, and one of the most consistently successful is R.R. Donnelley & Sons Company, Chicago. Its 1988 gross sales revenues of $2.878 billion represented a 16% increase over 1987; employee count also rose, from 22,000 to 24,000 at present.

Long a quiet giant with a guarded demeanor, Donnelley has very recently become open and aggressive as at no time in the past. There is news on many fronts:

- international expansion via the acquisition of Irish Printers, with plants in Dublin and Kildare, and the start-up of a new Ben Johnson plant at Thorp Arch in England;
- an equity position in the quick printing franchise AlphaGraphics;
- a controlling interest in privately-held Dowa Insatsu K.K., Tokyo, to produce Japanese-language versions of U.S. corporate annual reports and U.S. and U.K. catalogs;
- rapid expansion of its financial printing services operations (if counted separately, Donnelley would be among the top financial printers);
- exploitation of documentation and packaging services in the computer and software supplies industries and its expansion into a new major unit; and
- the groundbreaking this summer for a $30 million full-service book manufacturing plant in Reynosa, Mexico, planned for start-up in July 1990. The plant, expected eventually to employ 350, will be located in the Maquiladora industrial area across the border from McAllen, Tex., joining more than 1,400 U.S. manufacturing firms there; in terms of high quality and cost efficiency of its products, the plant is designed to compete in new, more effective ways with Asian suppliers. It will specialize in manufacturing professional books for publishers of medical, technical, legal, and accounting manuals, as well as multicolor juvenile books, said to be two of the fastest-growing product areas in book publishing.

Donnelley is a diversified printing firm, dominating in such product categories as catalogs, advertising inserts, magazines, books, directories, computer documentation, and financial printing. It now has 22 printing sites in the U.S. and nine overseas.

Since the first of the year, Donnelley has had a new president and chief executive officer in John R. Walter, who joined the company 20 years ago as a sales trainee.

Prior to his appointment, Walter had been executive vice-president of operations and previously held sales and sales management positions in the catalog and directory units. He holds a bachelor of science degree in business administration from Miami University, Oxford, Ohio.

The billion-dollar mark and the 50th consecutive year of higher sales revenue—27% over the previous year, to be exact—were the twin 1988 milestones for Deluxe Corporation, previously known as Deluxe Check Printers. This 74-year-old public company finished fiscal 1988 with sales of $1.2 billion for #2 ranking in the 1989 GAM 101. It employs 16,628.

Headquartered in St. Paul, Minn., Deluxe has production plants, distribution centers, and divisional or subsidiary facilities in more than 80 locations in 34 states. The company's tradition-

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al products and services group consists of business units that serve the U.S. payment systems market. These businesses include check and related financial forms printing, electronic funds transfer services, and new-account verification services to the financial industry.

Business Systems, the firm's business-to-business marketing group, includes its business forms and computer forms divisions and its Colwell Systems subsidiary. The Consumer Specialty Products Group markets greeting cards, gift wrap, stationery, etc., via direct mail.

The president and CEO, Harold V. Haverty, 59, joined the firm in 1954. His area of expertise is operations.

Three weeks before his 42nd birthday, John R. Walter was appointed president and chief executive officer of R.R. Donnelley & Sons Company, Chicago, at $2.878 billion the largest printer in North America.

The Lawson Mardon Group, ranked #3 with $928.3 million in worldwide sales (converted from $1.11 billion in Canadian currency), claims to be the leading packaging and printing firm in the United Kingdom and North America. Formed in 1985 in a leveraged buyout, it represents the merger of Mardon Packaging in the U.K. and Lawson & Jones based in Canada.

Some 70% of its business is located in Europe, where a like proportion of its employees are based, working in 24 operations. Overall, three divisions comprise the group: flexible packaging, folding carton, and rigid plastics and metals. Mississauga, Ontario, is corporate and North American headquarters; Graphics–North America and Packaging–North America each consist of six division companies, while Rigid Plastics–North America has one.

The graphics division concentrates on commercial web printing, high-quality sheetfed printing, and the label business.

President and CEO is Lawrence G. Tapp, 50.

A headquarters move to St. Paul, Minn., and a new CEO in Robert Smith—capped overall by a 33% increase in sales—lead the news for Maxwell Communication. Its annual sales now stand at $730 million, for the #4 position on the GAM 101 list.

Maxwell operations include a dozen printing sites and three prepress locations. The St. Paul plant is noteworthy because it is experiencing rapid expansion.

When James T. Sullivan left Maxwell to start his own operation in late 1988, Smith was promoted into the top slot from his post as executive vice-president–finance.

Dennison Manufacturing, Framingham, Mass., is completing a three-year period of reorganization and refocusing during which 11 diversified operations with sales of more than $100 million were sold or closed and its business segment reporting was reclassified from four groups to three: stationery products, systems, and packaging. At the same time, capital spending was boosted, to a high of $57 million in 1988, and the search for acqui-

sitions continues, but in the context of synergy with existing operations.

This year, Dennison expects to see positive results of renewed engineering and marketing efforts involving ion printing, a method of high-speed electronic printing its scientists patented a decade ago, as applied to ticket, tag, and label printing.

In fiscal 1988, sales increased nominally to $721 million and the #5 position on the list.

Nelson S. Gifford, 59, was elected president in 1972, CEO in 1975, and chairman in 1986.

Projected 1989 sales of $670 million propel privately-held World Color Press into the #6 slot. The 86-year-old firm is based in Effingham, Ill., employs 6,700, and operates seven manufacturing facilities; overall, it operates 543 web offset press units, 12 letterpress units, 100 gravure units, and four flexo units.

James A. Dawson, 52, was named president and CEO in March 1987 and chairman in November 1988. He is a graduate of Holy Cross College and holds an MBA degree from New York University Graduate School of Business.

Quebecor Printing, Montreal, was created in early 1989 in a restructuring of Quebecor, Inc., and was designed to regroup all printing activities, including the more than 20 plants acquired from BCE Publitech in October 1988. (The other main segments now are publishing and forest products.) Today, Quebecor Printing operates 46 plant sites in North America and employs 6,000. Projected annual sales, converted from Canadian currency, amount to $627 million, for #7 on the GAM 101 list.

Subsidiaries and divisions now include such BCE acquisitions as Ronalds Printing, Matthews Ingham & Lake, Alphatext, and British American Banknote, plus other 1988 acquisitions: Book Press, Holyoke Litho, Westweb Press, Imprimerie Nationale Joliette, and Imprico. Other well-known units: Graphic Web, Web Press Graphics, Semline, Eusey Press, Modern Printing & Litho, Pendell Printing, Somerset, Prestolitho, and Color Craft.

Last year, Quebecor invested about $20 million in plant expansion and improvement.

Jean Neveu, 48, a chartered accountant, joined the firm in May 1988 and became chairman and CEO in February 1989.

New to the GAM 101 list is Sullivan Graphics, which was formed in August 1988 by James T. Sullivan, 50, formerly of R.R. Donnelley & Sons and Maxwell Communication. It has since acquired Nicholstone Bindery, Looseleaf Inc., Haddon Craftsmen, Com-Com (composition), and GBP (Greater Buffalo Press) Industries (including American Color).

The acquisitions now amount to $575 million in combined annual sales, making Sullivan Graphics #8 on the list. Ten printing sites, 14 prepress facilities, and one composition site comprise the firm at present, which employs 4,800. It is based in Nashville, Tenn.

Treasure Chest Advertising, Glendora, Calif., claims to be the world's-largest printer of advertising circulars and takes pride in being a low-cost producer utilizing state-of-the-art equipment and its proximity to major markets via its 15 manufacturing sites. Sales of $540 million represent a 15% increase; it is #9 on the GAM 101 list.

Sanford G. Scheller, 58, has been president and CEO since 1986; he holds a BA in business

Calvin W. Aurand Jr. capped a lifetime career in printing when he was picked for the top spot at Banta Corporation, Menasha, Wis., a Fortune 500 company offering diverse printing and graphic/video services.